



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 11/22/2000

GAIN Report #GM0040

Germany

Citrus

Annual

2000

Approved by:

Peter O. Kurz

U.S. Embassy

Prepared by:

Dietmar Achilles

Report Highlights:

In MY 1999/2000 Germany imported about 74,000 tons of fresh U.S. grapefruit at a value of \$11.2 million. This is 1.8 percent of total volume of German fresh citrus imports. The main supplier of fresh citrus is Spain, with 75%. For MY 2000/01, German imports of fresh U.S. citrus are forecast to drop significantly because of the unfavorable Euro-Dollar exchange rate.

Includes PSD changes: No
Includes Trade Matrix: Yes
Trade Report
Berlin [GM1], GM

Executive Summary [1](#)

Germany does not produce citrus fruit. It relies primarily on imports from Spain (75%) and other Mediterranean countries. The only exception is the import of fresh grapefruit, where the U.S. leads with an average market share of 27 percent (predominantly the Ruby Red variety). For MY 2000/01, German imports of fresh citrus are forecast to drop by about two percent because of a smaller harvest in Spain. Imports from the United States are foreseen to drop significantly because of the unfavorably strong US\$ versus the Euro.

General [1](#)
MY 1999/2000 [1](#)
MY 2000/01 [3](#)

Table 1: Citrus Exports of Mediterranean Countries [4](#)

Table 2: German Trade in Fresh Oranges [5](#)

Table 3: German Trade in Fresh Crossbreeds [6](#)

Table 4: German Trade in Fresh Lemons [7](#)

Table 5: German Trade in Fresh Grapefruit [8](#)

Table 6: German Trade in Orange Juice [9](#)

Table 7: German Trade in Grapefruit Juice [10](#)

Executive Summary

Germany does not produce any citrus fruit. It relies primarily on imports from Spain (75%) and other Mediterranean countries. The only exception is the import of fresh grapefruit, where the U.S. leads with an average market share of 27 percent (predominantly the Ruby Red variety). For MY 2000/01, German imports of fresh citrus are forecast to drop by about two percent because of a smaller harvest in Spain. Imports from the United States are foreseen to drop significantly because of the unfavorably strong US\$ versus the Euro.

General

MY 1999/2000

1. Since Germany does not grow any citrus crops, its domestic consumption of citrus fruits and juices depends solely on imported supplies. Demand and consumption mainly depend on the size, quality, and export availability of the Mediterranean citrus crop, which is dominated by Spain. Total imports of all types of citrus fruits in MY 1999/2000 (October/September) are forecast at 1.12 million tons, which is ten percent more than in 1998/99. U.S. exports to Germany dropped by about 1,600 tons to 19,700 tons. German consumption of total fruit has been steadily growing over the past four years. A household panel reports per household consumption of 96 kilograms in 2000, compared to 93.7 kilograms in 1999.

German imports of fresh oranges in MY 1999/2000 went up to a high of about 520,000 tons compared to only 447,739 tons in 1998/99. In particular, during the first half of 2000 German consumers purchased a record volume of fresh oranges because prices had dropped to a record low of only DM 1.58 per kilo (US\$ = DM 2.28 - Nov 14, 2000). Increased production in Spain, Italy and Greece pushed down prices. The bulk of German imports stems from Spain, about 76 percent in 1999/2000. The German import season for fresh oranges starts mid to late October, peaking in January and basically ending in June. U.S. shipments of fresh oranges are negligible, amounting to 84 tons in MY 1999/2000.

Imports of fresh crossbreeds in MY 1999/2000 are forecast at 370,000 tons versus 346,635 tons in MY 1998/99. This is still 54,000 tons less than in 1997/98. The import increase in easy peelers in 1999/2000 is again mainly attributable to increased production in Spain. Spain supplies nearly 90 percent of German citrus crossbreed consumption. The import season for crossbreed begins about one month earlier than orange imports. It peaks in November/December, then falls back rapidly in January/February. During the period May through September imports of crossbreeds are near zero.

Imports of fresh lemons amounted to about 140,000 tons in MY 1999/2000, an increase of about ten percent over 1998/99. Spain again is the biggest supplier to the German market, providing about 71 percent. Argentina is the only relevant non-Mediterranean supplier of lemons.

Grapefruits are not as common in Germany as oranges and crossbreeds. German imports have been trending downwards during the past five years, amounting to about 74,000 tons in MY 1999/2000, which is 5,000 tons less than in 1998/99. The United States is the biggest exporter of grapefruit to Germany, shipping about 19,600 tons in 1999/2000, about eight percent less than one year ago. Turkey has steadily increased its exports to Germany until, in 1999/2000, it has reached the number two position as supplier to Germany. This has come

mainly at the expense of Israel and South Africa.

Imports of orange juice (65 degrees brix) totaled about 3000,000 tons in MY 1999/2000, with Brazil supplying 62.5 percent of all imports followed by Switzerland and the Netherlands. This represents an upswing from the previous year of 15 percent. The United States is only a residual supplier of orange juice and accounted for 1.6 percent of import market share. Per capita consumption of orange juice is reported to have fallen by five percent to 9.5 liters in 1999. The most popular fruit juice in Germany is apple juice, with a per capita consumption of 12.0 liter. Total liters of fruit juice consumption per household is reported at 40.5 in 1999.

Based on single strength conversion, imports of orange juice in 1999/2000 amounted to 1.58 million tons. To improve the usefulness of available trade data, imports of different juices consisting of varying concentrations were converted to a single-strength equivalent (11.2 degrees brix or 45 oexle) which differs slightly from the 11.8 degrees brix considered in the U.S. as single strength.

Imports of grapefruit juice (single-strength) in 1999/2000 are estimated at 80,000 tons with Cuba the clear leading supplier (35,000 tons). Over the past five years per capita consumption of grapefruit juice has grown by eleven percent.

MY 2000/01

Market reports from the German Central Market and Price Reporting Agency (ZMP) indicate a reduction of six percent of total citrus fruit exports from Mediterranean countries in MY 2000/01. The forecast is 5.195 million tons in 2000/01 versus 5.512 million tons in 1999/2000. Orange exports are foreseen to shrink by two percent to 2.577 million tons. ZMP reports that Spain experienced quality problems in crossbreeds and oranges because of the summer drought, followed by extensive rains. Only Israel and Greece will be in a position to export slightly more than in the previous MY. Easy peeler exports are forecast to drop by a significant 14 percent to 1.61 million tons. Reduction will be mainly in clementines, minus 20 percent. Grapefruit exports are forecast to shrink by four percent because of lower Turkish production. Increased availability of grapefruit in Cyprus and Spain cannot balance out the Turkish deficit.

Table 1: Citrus Exports of Mediterranean Countries

Citrus Exports of Mediterranean Countries, in 1,000 tons				
	1997/98	1998/99	1999/2000	2000/01*
Oranges	2720	2462	2640	2577
Spain	1281	1214	1430	1373
Morocco	395	361	326	321
Egypt	259	211	211	212
Greece	325	260	268	281
Italy	120	75	123	99
Turkey	45	102	86	85
Other	295	239	196	206
Easy Peeler	1799	1579	1880	1611
Spain	1323	1102	1317	1150
Morocco	216	223	271	176
Turkey	107	137	123	115
Israel	47	30	35	36
Other	106	87	134	134
Lemons	670	665	734	756
Spain	541	451	455	540
Turkey	39	154	195	130
Italy	24	11	26	31
Other	66	49	58	55
Grapefruits	230	243	254	245
Israel	137	123	115	120
Cyprus	32	33	23	34
Other	61	87	116	91
All Citrus	5425	4954	5512	5195
* Forecast				
Source: ZMP				

The unfavorably high exchange rate of the US\$ versus the Euro will make it very difficult for U.S. grapefruit exporters to the European region. German importers and retailers claim that they cannot fully ignore the high priced U.S. grapefruits this season, but say demand for them will shrink considerably. Because of a good domestic apple crop and extremely low priced banana imports, the domestic customer will easily switch over to other fruits and hopefully return to U.S. grapefruits in the next season with a more export supportive exchange

rate.

Table 2: German Trade in Fresh Oranges

German Imports of Fresh Oranges, in MT			
MY 1998/98*		MY 1999/2000**	
USA	27	USA	84
Spain	315250	Spain	395167
Italy	30242	Italy	41412
Morocco	40562	Morocco	24246
South Africa	28735	South Africa	17204
France	7632	France	4548
Greece	503	Greece	14404
Zimbabwe	2552	Zimbabwe	7392
Israel	5974	Israel	3711
Argentina	8278	Argentina	4999
Cyprus	2187	Cyprus	1310
Other	5797	Other	5037
TOTAL	447739	TOTAL	519514
German Exports of Fresh Oranges, in MT			
MY 1998/98*		MY 1999/2000**	
USA	0	USA	0
Sweden	6100	Sweden	2292
Spain	3849	Belgium	1006
Austria	3575	Austria	3983
Denmark	2647	Denmark	1813
Netherlands	2908	Netherlands	1451
Poland	2835	Poland	1520
Great Britain	1187	Great Britain	557
France	1181	France	1110
Finland	587	Finland	815
Italy	452	Italy	854
Other	746	Other	1115
TOTAL	26067	TOTAL	16516
*Period Oct1998-Sep1999			
* *Period Oct1999-Aug2000			

Source: FAS Bonn based on official statistics

Table 3: German Trade in Fresh Crossbreeds

German Imports of Fresh Crossbreeds, in MT			
MY 1998/98*		MY 1999/2000**	
USA	0	USA	11
Spain	299787	Spain	322183
Morocco	18623	Morocco	14700
Italy	3381	Italy	8129
Turkey	9665	Turkey	6132
Cyprus	3108	Cyprus	3212
France	1950	France	1457
Greece	5272	Greece	3000
Israel	1066	Israel	1000
Argentina	1898	Argentina	754
South Africa	995	South Africa	433
Other	890	Other	1123
TOTAL	346635	TOTAL	362134
German Exports of Fresh Crossbreeds, in MT			
MY 1998/98*		MY 1999/2000**	
USA	0	USA	0
Sweden	4577	Sweden	2988
Finland	3599	Finland	858
Poland	3126	Poland	1965
Denmark	1457	Denmark	1194
Netherlands	1220	Netherlands	905
France	838	France	692
Italy	517	Italy	925
Austria	1186	Austria	791
Russia	129	Russia	310
Czech Republic	394	Czech Republic	371
Other	2017	Other	856
TOTAL	19060	TOTAL	11855
*Period Oct1998-Sep1999			
* *Period Oct1999-Aug2000			
Source: FAS Bonn based on official statistics			

Table 4: German Trade in Fresh Lemons

German Imports of Fresh Lemons, in MT			
MY 1998/98*		MY 1999/2000**	
USA	4	USA	0
Spain	86762	Spain	92191
Argentina	21091	Argentina	13979
Italy	6336	Italy	6058
Greece	3383	Greece	4067
Turkey	6419	Turkey	7164
Cyprus	1987	Cyprus	3435
France	727	France	275
South Africa	421	South Africa	172
Uruguay	322	Uruguay	91
Brazil	51	Brazil	119
Other	245	Other	1171
TOTAL	127748	TOTAL	128722
German Exports of Fresh Lemons, in MT			
MY 1998/98*		MY 1999/2000**	
USA	0	USA	0
Spain	4300	Spain	321
Austria	2950	Austria	1182
Finland	173	Finland	1481
Russia	384	Russia	345
Poland	321	Poland	760
Netherlands	546	Netherlands	267
France	331	France	362
Sweden	528	Sweden	191
Denmark	380	Denmark	381
Czech Republic	0	Czech Republic	210
Other	206	Other	460
TOTAL	10119	TOTAL	5960
*Period Oct1998-Sep1999			
* *Period Oct1999-Aug2000			
Source: FAS Bonn based on official statistics			

Table 5: German Trade in Fresh Grapefruit

German Imports of Fresh Grapefruit, in MT			
MY 1998/98*		MY 1999/2000**	
USA	21372	USA	19054
Turkey	12224	Turkey	13575
South Africa	10059	South Africa	7030
Israel	15499	Israel	10596
Argentina	4447	Argentina	228
Honduras	753	Honduras	3542
Spain	7278	Spain	6547
Cuba	2037	Cuba	2002
Cyprus	3163	Cyprus	1995
Italy	248	Italy	464
France	294	France	803
Other	2217	Other	4479
TOTAL	79591	TOTAL	70315
German Exports of Fresh Grapefruit, in MT			
MY 1998/98*		MY 1999/2000**	
USA	0	USA	0
Poland	2138	Poland	2187
France	841	France	677
Netherlands	855	Netherlands	1856
Denmark	446	Denmark	453
Austria	328	Austria	245
Czech Republic	1	Czech Republic	216
Italy	686	Italy	259
Great Britain	396	Great Britain	164
Belgium	122	Belgium	107
Sweden	109	Sweden	68
Other	89	Other	101
TOTAL	6011	TOTAL	6333
*Period Oct1998-Sep1999			
* *Period Oct1999-Aug2000			
Source: FAS Bonn based on official statistics			

Table 6: German Trade in Orange Juice

German Imports of Orange Juice, in MT Single Strength			
MY 1998/98*		MY 1999/2000**	
USA	7998	USA	22352
Brazil	896669	Brazil	899033
Switzerland	97856	Switzerland	168085
Netherlands	82686	Netherlands	70462
Belgium	29489	Belgium	10093
Spain	39117	Spain	43733
Italy	33317	Italy	32781
Poland	25129	Poland	42501
Czech Republic	16785	Czech Republic	17426
Morocco	18576	Morocco	9918
Cuba	13409	Cuba	35352
Other	103497	Other	85285
TOTAL	1364528	TOTAL	1437021
German Exports of Orange Juice, in MT Single Strength			
MY 1998/98*		MY 1999/2000**	
USA	779	USA	467
France	191820	France	244885
Netherlands	104652	Netherlands	92867
Denmark	63944	Denmark	53021
Belgium	63886	Belgium	82690
Great Britain	45908	Great Britain	79610
Italy	32406	Italy	17251
Spain	34383	Spain	73402
Sweden	22776	Sweden	14143
Austria	4024	Austria	6353
Greece	5093	Greece	14078
Other	59671	Other	34802
TOTAL	629342	TOTAL	713569
*Period Oct1998-Sep1999			
* *Period Oct1999-Jul2000			
Source: FAS Bonn based on official statistics			

Table 7: German Trade in Grapefruit Juice

German Imports of Grapefruit Juice, in MT Single Strength			
MY 1998/98*		MY 1999/2000**	
USA	2478	USA	3806
Netherlands	11217	Netherlands	5178
Cuba	19611	Cuba	33711
Israel	7595	Israel	10376
Belize	12143	Belize	9265
France	1281	France	1749
South Africa	6858	South Africa	6450
Brazil	3253	Brazil	1733
Argentina	0	Argentina	630
Other	4009	Other	1953
TOTAL	68445	TOTAL	74851
German Exports of Grapefruit Juice, in MT Single Strength			
MY 1998/98*		MY 1999/2000**	
USA	0	USA	0
Netherlands	4163	Netherlands	5345
France	2245	France	1349
Belgium	1834	Belgium	1148
Austria	250	Austria	356
Italy	610	Italy	220
Great Britain	674	Great Britain	189
Finland	65	Finland	41
Slovakia	86	Slovakia	67
Russia	63	Russia	52
Other	1627	Other	712
TOTAL	11617	TOTAL	9479
*Period Oct1998-Sep1999			
* *Period Oct1999-Jul2000			
Source: FAS Bonn based on official statistics			